

dPCR and qPCR Products Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (Reagents & Consumables, Instruments, Software), By Application (Clinical Applications, Forensic Applications), By End User (Hospitals & Diagnostic Centres, Research Laboratories & Academic Institutes, Clinical Research Organizations, Others), By Region and Competition, 2019-2029F

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Abstracts

Global dPCR and qPCR Products Market was valued at USD 8.12 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.20% through 2029. dPCR (digital polymerase chain reaction) and qPCR (quantitative polymerase chain reaction) are both molecular biology techniques used to analyze and quantify DNA or RNA molecules. The choice between dPCR and qPCR depends on the specific requirements of your experiment. qPCR is often favored for relative quantification of gene expression, while dPCR is more suitable for applications requiring absolute quantification, such as rare mutation detection or precise quantification of nucleic acid targets. The products associated with these techniques include the instruments, reagents, and consumables necessary to perform the respective assays accurately and reliably. Real-time PCR and digital PCR are two extensively employed techniques for the detection and quantification of nucleic acids. Real-time PCR is a well-established technology renowned for its rapid and sensitive detection of nucleic acids in biological samples. Conversely, digital PCR offers an absolute measure of target nucleic acid molecules by partitioning

PCR and qPCR market. Digital PCR and real-time PCR play a crucial role in the rapid and accurate detection of these diseases, enabling early diagnosis and treatment. Additionally, the growing incidence of genetic disorders such as cystic fibrosis, sickle cell anemia, and Tay-Sachs disease contributes to the expansion of the dPCR and qPCR market. These techniques facilitate the diagnosis of these disorders and help monitor treatment effectiveness. Moreover, the successful completion of the Human Genome Project has fueled the demand for digital PCR and real-time PCR. The wealth of information obtained from the project regarding human genetics has paved the way for the development of new diagnostic and therapeutic applications for these techniques.

Key Market Drivers

Technological Advancements in PCR

New PCR technologies have improved the sensitivity and precision of both dPCR and qPCR. This means researchers can detect and quantify nucleic acids with higher accuracy, even at very low concentrations. This heightened sensitivity is crucial in various applications, such as the detection of rare mutations, circulating tumor cells, or minimal residual disease in cancer diagnostics. Advances in PCR technologies have enabled the simultaneous detection and quantification of multiple targets in a single reaction. This capability is particularly valuable in genomics research, pathogen detection, and diagnostics, as it allows for more comprehensive analysis with reduced time and cost. Automation and robotics have been integrated into dPCR and qPCR workflows, making these techniques more efficient and suitable for high-throughput applications. This has increased demand in fields like drug discovery, genomics, and clinical diagnostics, where large-scale screening and analysis are required.

PCR technologies have evolved to require less manual intervention and shorter assay setup times. This reduction in hands-on time increases the efficiency of laboratory workflows and decreases the risk of human error, making dPCR and qPCR more attractive for routine testing and diagnostics. The availability of advanced data analysis software and algorithms has made it easier to process and interpret results from dPCR and qPCR experiments. Researchers can quickly analyze and visualize complex data, facilitating better decision-making in research and diagnostics. Some PCR platforms have become smaller and more portable, allowing for on-site testing and point-of-care diagnostics. This trend has expanded the potential applications of dPCR and qPCR, particularly in resource-limited settings and during disease outbreaks.

Growth In the Geriatric Population

Geriatric individuals are more prone to various age-related diseases, including cancer, neurodegenerative disorders, cardiovascular diseases, and infectious diseases. dPCR and qPCR are essential tools for early detection, diagnosis, and monitoring of these diseases. As the geriatric population expands, so does the demand for accurate and sensitive diagnostic tests, which often rely on PCR-based techniques. Cancer incidence increases with age, and cancer is a significant health concern among the elderly. PCR-based techniques, including qPCR, are used for cancer screening, identifying specific genetic markers, and monitoring treatment responses. The growing geriatric population has led to a higher demand for PCR-based tests in oncology.

Geriatric individuals are more susceptible to infections due to age-related changes in the immune system. PCR-based tests are crucial for the rapid and accurate detection of infectious agents, such as viruses and bacteria. The geriatric population's vulnerability to infectious diseases increases the need for PCR-based diagnostics, especially during outbreaks and pandemics. As the aging population continues to grow, there is an increasing interest in understanding the biological mechanisms of aging and factors that contribute to longevity. Researchers use PCR-based techniques to study genetic and epigenetic changes associated with aging. This research contributes to our understanding of aging-related diseases and potential interventions, driving the demand for dPCR and qPCR. In cancer treatment, monitoring minimal residual disease (MRD) is crucial to assess treatment response and predict disease recurrence. PCR-based techniques, especially dPCR, offer high sensitivity for detecting trace amounts of cancer cells. The aging population's higher cancer prevalence underscores the importance of MRD monitoring, leading to increased demand for dPCR.

Increasing Investments and Availability of Funds For PCR-Based Research

Increasing investments and the availability of funds for PCR-based research have a substantial impact on driving the demand for dPCR (digital PCR) and qPCR (quantitative PCR) technologies. With more funding available, research institutions and biotechnology companies can undertake a broader range of projects. This includes investigations into various fields such as genomics, transcriptomics, epigenetics, oncology, microbiology, and infectious diseases. Both dPCR and qPCR are versatile tools that can be applied to numerous research areas, leading to increased demand for these technologies. Funding allows PCR technology developers to invest in research and development, leading to the creation of more advanced and user-friendly dPCR and qPCR instruments. These innovations attract researchers by offering improved

performance, increased automation, and reduced experimental time.

Funding sources enable research organizations to acquire the latest dPCR and qPCR instruments and related accessories. Researchers are more likely to adopt these techniques when they have access to state-of-the-art equipment, which enhances the quality and reliability of their results. Funding often supports high-impact research initiatives, such as large-scale genomics projects, precision medicine studies, and investigations into the molecular basis of diseases. These initiatives frequently rely on dPCR and qPCR for genomic profiling, gene expression analysis, and biomarker discovery. Increasing investments in healthcare research and diagnostics drive the demand for dPCR and qPCR. These techniques are critical for precision medicine, where genetic and molecular information is used to tailor treatments to individual patients. Funding support for translational research and clinical trials further bolsters the demand for PCR-based technologies in healthcare. In response to emerging infectious diseases and pandemics, governments and organizations allocate funds to support research and surveillance efforts. dPCR and qPCR are vital for detecting and monitoring infectious agents, making them essential tools in these scenarios.

Key Market Challenges

High Cost of Digital PCR Devices

Many research laboratories, especially those in academic or smaller settings, may have limited budgets. The initial cost of purchasing a dPCR instrument can be prohibitively expensive for some of these labs. As a result, researchers may opt for alternative techniques or share access to dPCR instruments, which can reduce the overall demand for these devices. In addition to the initial instrument cost, dPCR requires ongoing operational costs, including the purchase of specialized reagents and consumables. High operational costs can deter researchers and organizations from adopting dPCR and qPCR, particularly when they have budget constraints. Maintenance and servicing of dPCR instruments can be costly. Labs that invest in dPCR technology need to allocate additional resources for instrument maintenance and repairs. The cost of maintaining the instrument over time can be a significant consideration for labs with limited budgets.

Researchers and institutions assess the return on investment (ROI) when acquiring expensive equipment like dPCR instruments. The cost-benefit analysis may not always favor dPCR if the expected benefits do not justify the high upfront and ongoing costs. This assessment can lead to lower demand. While dPCR is highly precise and offers

advantages for specific applications, qPCR (real-time PCR) is a more cost-effective alternative for many routine quantitative nucleic acid analysis tasks. Researchers often choose qPCR when the level of precision offered by dPCR is not necessary, which can reduce the demand for dPCR devices. The high cost of dPCR devices has spurred competition and innovation in the PCR instrument market. Some companies are working on developing more cost-effective dPCR solutions. As these options become available, the demand for lower-cost dPCR instruments may increase.

Technical Limitations Related To PCR

Technical limitations associated with PCR (Polymerase Chain Reaction) can impact the demand for both dPCR (digital PCR) and qPCR (quantitative PCR) technologies, as these limitations can influence researchers' confidence in the accuracy and reliability of PCR-based assays. PCR-based techniques can be sensitive to contaminants and inhibitors in the sample, potentially leading to false-positive or false-negative results. Researchers may be hesitant to use dPCR or qPCR if they have concerns about assay specificity or if their samples contain substances that could interfere with amplification. PCR can introduce amplification bias, where certain DNA or RNA sequences are preferentially amplified over others. This bias can affect the accuracy of quantification, especially in qPCR. Researchers may seek alternative techniques or approaches to mitigate this limitation.

Detecting rare mutations in a sample can be challenging, as PCR-based techniques may have a limited ability to distinguish rare variants from background noise. This limitation may reduce demand for dPCR and qPCR in applications where high sensitivity is required, such as cancer mutation detection. Sample preparation for PCR-based techniques can be time-consuming and technically demanding. Researchers may opt for simpler, less labor-intensive methods, particularly when analyzing a large number of samples. The cost of dPCR and qPCR instruments and reagents can be a limiting factor, particularly for smaller research labs or institutions with limited budgets. Researchers may opt for more cost-effective techniques that provide similar results for their specific needs.

Key Market Trends

Cancer Research and Diagnostics

The demand for dPCR and qPCR is expected to rise in cancer research and diagnostics. These techniques are crucial for detecting and monitoring cancer-specific

mutations, tracking minimal residual disease, and assessing treatment responses. As cancer incidence continues to increase worldwide, the need for accurate and sensitive molecular tools will grow. Detecting cancer at an early stage is crucial for successful treatment and improved patient outcomes. dPCR and qPCR techniques are highly sensitive and can identify cancer-specific mutations or biomarkers even when they are present in small quantities. These techniques enable the development of highly accurate screening tests for early cancer detection. After cancer treatment, monitoring MRD, which refers to the presence of residual cancer cells in the body, is critical for assessing treatment effectiveness and predicting disease recurrence. dPCR, with its ability to detect low levels of mutated DNA or RNA, is well-suited for MRD monitoring, providing valuable insights into a patient's response to therapy.

Cancer is a highly heterogeneous disease, with variations in genetic mutations and molecular profiles among patients. dPCR and qPCR allow for the precise characterization of a patient's cancer at the molecular level. This information is essential for tailoring treatment strategies to individual patients through personalized medicine approaches. Oncologists use dPCR and qPCR to assess how a patient's cancer is responding to treatment. By tracking changes in the levels of specific biomarkers or mutations during therapy, clinicians can make informed decisions about treatment modifications or adjustments.

Precision Medicine

The field of precision medicine is growing rapidly, with a focus on tailoring medical treatments to an individual's genetic and molecular profile. Both dPCR and qPCR play pivotal roles in identifying specific genetic markers, monitoring disease progression, and selecting the most effective treatments. As precision medicine becomes more integrated into healthcare, the demand for precise and sensitive molecular diagnostic tools like dPCR and qPCR will increase. Precision medicine relies on identifying specific genetic markers, mutations, or variations associated with diseases or conditions. dPCR and qPCR are invaluable for accurately detecting and quantifying these genetic markers, providing essential information for disease diagnosis and treatment selection. dPCR and qPCR enable the comprehensive profiling of an individual's genetic and molecular makeup. This profiling helps clinicians understand the genetic factors contributing to a patient's disease, guiding treatment decisions based on the patient's unique molecular profile.

Liquid biopsies, which involve analyzing circulating tumor DNA (ctDNA) or other biomarkers in blood samples, are essential for non-invasive monitoring of cancer

progression and treatment response. dPCR and qPCR are central to liquid biopsy assays, facilitating real-time assessment of cancer dynamics.

Segmental Insights

Product Insights

Based on the product, the dPCR and qPCR Products market is divided into Reagents Consumables, Instruments, and Software. The segment of reagents consumables is anticipated to witness the highest growth during the forecast period. Factors such as the expanding applications of qPCR (due to its technological advantages over traditional PCR, such as real-time analysis and reduced analysis time), increasing private-public funding for life science research, and the rising number of probe-based multiplex genetic analysis procedures (which require the analysis of low-volume gene samples) are expected to drive the growth of the qPCR reagents and consumables market.

Application Insights

Based on the application segment, the market is segmented into clinical applications, and forensic applications. The clinical segment accounted for the largest revenue share. This can be attributed to several factors, including the increasing prevalence of diseases such as cancer, infectious diseases, and diabetes; the high precision of testing methods; the growing commercialization of reagents for diagnostics; the effective disease diagnosis, monitoring, and treatment; and the additional benefits in disease detection. For example, in April 2019, Thermo Fisher Scientific Inc. introduced the QuantStudio 6 7 Pro RT-PCR Systems, which incorporate advanced features like facial identification, voice assistant, and RF identification.

Regional Insights

North America accounted for the largest share of the global dPCR and qPCR market, followed by North America. The significant share of the North American market can be attributed to several factors. These include the increased adoption of innovative and novel genomic analysis products, such as advanced qPCR and dPCR products. Additionally, the availability of RD funding for genomic research, along with the robust research infrastructure in the region, has played a crucial role. Moreover, the expanding use of PCR techniques in clinical diagnostics and forensics has contributed to the market growth. Lastly, the early commercialization of qPCR/dPCR products compared to other regions has also been a driving force behind North America's dominance in this

market.

Key Market Players

Abbott Laboratories, Inc.

Agilent Technologies, Inc.

Analytik Jena AG

Becton Dickinson and Company

Bio Molecular Systems Pty Ltd

Biomeme Inc.

Biomérieux S.A.

Bioneer Corporation

Bio-Rad Laboratories, Inc.

Cole-Parmer Instrument Company Inc

Report Scope:

In this report, the Global dPCR and qPCR Products Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

dPCR and qPCR Products Market, By Product:

o Reagents Consumables

o Instruments

o Software

dPCR and qPCR Products Market, By Application:

oClinical Applications

oForensic Applications

dPCR and qPCR Products Market,By End User:

oHospitals Diagnostic Centres

oResearch Laboratories Academic Institutes

oClinical Research Organizations

oOthers

dPCR and qPCR Products Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global dPCR and qPCR Products Market.

Available Customizations:

Global dPCR and qPCR Products marketreport with the given market data, Tech Sci

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Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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